
Introduction & Methodology

Survey Purposes. This chapter analyzes results from a survey of potential visitors to Glacier National Park conducted in June 2001. For purposes of this study, a “potential” visitor is a person who (a) made an inquiry to Travel Montana regarding Glacier National Park within the last twelve months; (b) did not travel to Glacier National Park within the last twelve months, and; (c) is likely to travel to Glacier National Park within the next three years.

<p>Primary Survey Purpose</p>

<p><i>Understand potential visitor responses to possible travel limitations on Going-to-the-Sun Road</i></p>
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The primary reason for this survey was to collect information that will facilitate completion of the engineering and socioeconomic studies for the Going-to-the-Road rehabilitation project. Potential visitors are of particular interest in the study effort because they represent the travelers that local tourism organizations will be targeting

to come to Glacier National Park during the years of road rehabilitation. Their opinions regarding future travel plans to the park under different travel limitations are germane to estimating the potential impact of road restrictions on visitation.

The content of this survey focused on awareness of Glacier National Park and Going-to-the-Sun Road, potential activities while visiting the park, contingent behavior relative to potential road restrictions due to rehabilitation improvements, and travel party demographics. The survey instrument contained 22 questions. It was kept as short as possible while accomplishing the survey objectives so as to minimize respondent inconvenience and mid-survey terminations.

This chapter focuses on the set of survey questions that relate most directly to impacts of potential park road restrictions due to rehabilitation improvements. Results from other survey questions relating to in-park visitor activity are summarized in this chapter and reported in the appendix. The complete survey instrument and a tabular presentation of the survey results are contained in Appendix B.

Methodology. This survey was conducted via telephone. The respondent universe consisted of approximately 17,000 individuals who made inquiries to Travel Montana regarding Glacier National Park in the last twelve months (June 2000 through May 2001). Travel Montana is a state-sponsored travel promotion organization.

This was a survey of 350 respondents. To achieve this survey size, a sample of 3,500 individuals was drawn systematically from the respondent universe. This sample represented a multiple of ten, which provided a safety margin for refusals, incorrect phone numbers, and non-response. The sample was drawn so that the number of individuals was approximately equal among the twelve months.

For each initial telephone contact made, the survey administrator made an original attempt plus up to three follow-up attempts until a sample of 350 was achieved. (In fact, 354 interviews with qualified respondents were achieved.) The administrator equalized attempts over the twelve months.

From the original list of 3,500 individuals, the survey administrator estimates that approximately 50 percent (1,750) were unreachable due to a variety of reasons, including answering machine, fax machine, no answer, moved, and bad phone numbers.

Among the remaining individuals on the list, 480 contacts were made. Questions 1, 2, and 4 were used to filter out refusals and unqualified respondents.

- Among these successful contacts, 47 refused to participate, either immediately or after hear-

Contact Tally

Refusals (Q1 = no)	47
Unqualified Respondent (Q2 = no)	68
Unqualified Respondent (Q4 = no)	11
Respondents	<u>354</u>
Total Contacts Made	480

ing the introduction, by answering “no” to the question *“Would you be willing to participate in the survey?”* (Q1)

- Sixty-eight were willing to participate, but were unqualified because they responded “no” to the question *“Have you traveled to Glacier National Park in the last twelve months?”* (Q2)
- Eleven were unqualified because they responded “no” to the question, *“Is it likely that you will travel to Glacier National Park sometime in the next three years?”* (Q4)

These results yielded an acceptance rate of 90 percent. Among those willing to participate in the survey, 82 percent were qualified respondents in that they had not traveled to Glacier

National Park within the last twelve months but are likely to do so within the next three years.

Acceptance Rate / Qualified Respondents

Acceptance Rate: (433/480)	90%
Qualified Respondents (354/433)	82%
Unqualified Respondents (79/433)	18%

Report Content. This chapter is divided into the following sections:

- Introduction and Methodology
- Overview of Key Survey Results
- Glacier National Park Awareness, Activities and Accommodations
- Going-to-the-Sun Road Restrictions
- Respondent Demographics
- Analysis of Nonresponse
- Comparison with the 2000 Survey of Visitors
- Survey Instrument and Tabular Survey Results (Appendix B)

Overview of Key Survey Results

Composite Respondent Characteristics. Based on responses to this survey, the typical travel party is a family comprised of two adults plus one to two people; the average travel party size is 3.6 people. Thirty-seven percent of the travel parties are expected to contain only adults between 24 and 64; 22 percent of the travel parties are expected to contain seniors only; 34 percent are expected to contain a child sixteen or younger.

The distribution of household incomes was generally comparable to US averages. Sixty percent of the respondents were female and 40 percent were male. The average respondent age was 51; two percent were under 25, and 22 percent were 65 or older. For those planning to stay in the park, respondents expressed a preference for a historic lodge or cabin with modern conveniences.

Would you come to Glacier National Park? Two questions were asked that focus on the question, would you still come to the park if there were travel restrictions on Going-to-the-Sun Road.

Question 14, *“Would you still come to Glacier National Park but visit other Park attractions?”* was asked immediately after the respondent was guided through a series of six questions about travel restrictions on Going-to-the-Sun Road.

Among those with a “yes” or “no” response, 95 percent indicated that they would still come and five percent said they would not come. It is also important to point out that 21 percent said they don’t know whether they would come or not.

**Still Come To Glacier if
GTTS Road Travel is Restricted (Q14)
(Respondents answering ‘yes’ to Q13)**

<u>Response</u>	<u>% Responses</u>
Yes	95%
No	5%
Total	100%

(“Don’t know” responses excluded)

**Travel Alternatives if Construction
Limits Traffic on GTTS Road (Q16)**

<u>Response</u>	<u>% Responses</u>
Selected a travel alternative	96%
Would not come to park	4%
Total	100%

(“Don’t know” responses excluded)

Question 16 provided a range of travel alternatives if there were travel limitations on Going to the Sun Road. Ninety-six percent selected one of the travel alternatives and only four percent said they would not come to the park.

**Willing to Use Going-to-the-Sun Road
with a Travel Delay**

Travel Delay	% Using Road
30 minutes	89%
1 Hour	64%
4 Hours	15%

("Don't know" responses excluded)

**Using Going-to-the-Sun Road with
a Travel Delay or Restrictions.**

Nearly ninety percent (89%) of the respondents would still use Going-to-the-Sun Road if there were a 30-minute travel delay. There was a significant decline in willingness to accept travel delays over Going-to-the-Sun Road as the duration of the travel delay increases. However, if the travel delay doubled to one-hour, then

the proportion of those willing to use Going-to-the-Sun Road decreased to 64 percent. With a four-hour travel delay, only fifteen percent were willing to accept the delay and still travel on Going-to-the-Sun Road.

The proportion of respondents who are uncertain of their reaction to travel delays increased as the travel delays increased. Only six percent were uncertain about their reaction to a 30-minute travel delay; thirteen percent were uncertain about a one-hour travel delay, and seventeen percent were uncertain about a four-hour travel delay.

With the offer of useful information from guides regarding possible wildlife viewing opportunities, etc. (Q15), the proportion of respondents willing to accept travel restrictions and use Going-to-the-Sun Road increased to 92 percent.

Comparison with 2000 Survey of Visitors. Respondents to this survey of potential visitors were more likely to travel to Glacier National Park with travel restrictions on Going-to-the-Sun Road than were respondents to the *2000 Survey of Visitors*. Twenty-five percent of the *2000 Survey of Visitors'* respondents said they would not come to Glacier if there were a one-hour travel delay associated with Going-to-the-Sun Road. Depending on the question used, between four (Q16) and five (Q14) percent of the respondents to this survey said they would not come to Glacier with travel restrictions on Going-to-the-Sun Road.

Visitor Development Strategy Implications. This survey provides some direction for the visitor development strategy that has been suggested as part of the socioeconomic study and will be refined as a part of the Going-to-the-Sun Road rehabilitation

project. There is a clear indication (Q15) that the provision of useful information can bolster usage of Going-to-the-Sun Road and perhaps bolster travel to the park.

1. Women, large travel parties (4+ persons), and travel parties with children are more reticent about using Going-to-the-Sun Road with travel limitations than others. A special effort targeting these more difficult market segments is appropriate.
2. There is a significant percentage (21%, Q14) of uncertainty as to whether respondents would come to Glacier National Park if Going-to-the-Sun Road travel were restricted. A marketing campaign that targets these uncertain respondents and converts them to visitors would yield substantial gain in visitors.

Going-to-the-Sun Road Restrictions

The primary reason for this survey was to understand more about the potential visitor's tolerance for and resistance to alternative travel limitations on Going-to-the-Sun Road. In addition to inquiring about prior visitation to Glacier National Park and awareness of Going-to-the-Sun Road, a series of six hypothetical or contingent behavior questions were asked about various potential travel delays or restrictions.

Visitors were asked if they would still come to Glacier National Park if they expected a 30-minute travel delay (Q10), a one-hour travel delay (Q11), a four-hour travel delay (Q12), and one-way travel restrictions (Q13) over Going-to-the-Sun Road. They were also asked if they did not use Going-to-the-Sun Road due to travel limitations, would they still come to the park (Q14) and would information increase the probability of using the Road (Q15). Finally, they were asked if they would consider alternative ways to travel over Going-to-the-Sun Road other than using their private vehicle (Q16). Responses to each of these questions are summarized in this section and detailed more specifically in the Appendix.

Q5. Have you ever visited Glacier National Park?

Thirty-eight percent of the respondents have visited Glacier National Park before and 62 percent have not.

As will be described in further detail below, willingness to travel to the park with a variety of road restriction alternatives was quite similar whether or not the respondent had ever traveled to the park before.

**Have you ever visited
Glacier National Park (Q5)?**

<u>Response</u>	<u>% of Responses</u>
Yes (<i>prior visitor</i>)	38%
No (<i>non-visitor</i>)	<u>62%</u>
Total	100%

- Among the prior visitors, 91 percent would still travel to the park if there were a 30-minute delay over Going-to-the-Sun Road; fourteen percent would still travel to the park if there were a four-hour delay.
- Among the non-visitors, 89 percent would still travel to the park if there were a 30-minute delay over Going-to-the-Sun Road and fifteen percent would still travel to the park with a four-hour delay.

Q6. Have you heard of Going-to-the-Sun Road?

**Have you heard of Going-to-the-Sun
Road (Q6)?**

<u>Response</u>	<u>% of Responses</u>
Yes	61%
No	<u>39%</u>
Total	100%

Sixty-one percent of the respondents have heard of Going-to-the-Sun Road and 39 percent have not. Among the prior visitors, awareness of Going-to the Sun Road is very high; 84 percent have heard of the Road. Among the non-visitors, 47 percent have heard of Going-to-the-Sun Road.

Young and lower-income respondents are less aware of Going-to-the-Sun Road than others. There was a strong inverse correlation between respondents with incomes of less than \$25,000 and respondents under 25 years old and knowledge of Going-to-the-Sun Road.

- Those who have heard of Going-to-the-Sun Road are more accepting (95%) of a potential 30-minute travel delay than the average (89%). They are also slightly more accepting of a four-hour delay (16%) than the average (15%).
- Those who have not heard of Going-to-the-Sun Road are less accepting (80%) of a potential 30-minute travel delay than average (89%) and less accepting of a four-hour delay (10%) than the average (15%).

One potential interpretation of these results is that those who are more knowledgeable about the Road and the park know there are other facets of the park to be explored if travel on Going-to-the-Sun Road is restricted in some manner.

Q10. *Going-to-the-Sun Road is the only road that provides access to Logan Pass. If you knew ahead of time that your travel would be delayed while using Going-to-the-Sun Road for up to 30 minutes while road crews made improvements, would you still use the Road and accept the delay?*

Use Road with a 30-minute travel delay? (Q10)		
Response	% Responses	% Responses
Yes	84%	89%
No	10%	11%
Don't Know	6%	---
Total	100%	100%

Eighty-four percent of the respondents would accept a 30-minute travel delay; ten percent would not accept a delay, and six percent don't know.

Among those with a "yes" or "no" response, 89 percent would accept the delay and use the Road; eleven percent would not. This 89/

11 split is the standard against which the analysis is developed.

- **Heard of Going-to-the-Sun Road.** Respondents who have heard of Going-to-the-Sun Road were more accepting (95%) of a potential 30-minute travel delay than the average (89%). Respondents who have never heard of the Road were less accepting (80%) of the travel delay than the average (89%).
- **Prior Visits to Glacier National Park.** There was no appreciable difference between respondents who have been to the park and those who have never been. Ninety-one percent of respondents with a prior visit would accept the travel delay; 81 percent of those who have never visited the park would accept the 30-minute travel delay.

- **Demographics.** Responses to Q10 did not differ according to travel party characteristics or respondent demographics. For example, 87 percent of the travel parties with children and 91 percent of the seniors-only travel parties would accept a 30-minute delay. Ninety percent of the large (4 or more persons) and 89 percent of the small (1 or 2 persons) travel parties would accept a 30-minute delay. Eighty-nine percent of the female respondents and 90 percent of the male respondents would accept a 30-minute delay. There was no correlation between respondent household income and responses to Q10.

Q11. If you knew that the travel delay might be up to one hour, would you still use the Road and accept the delay? (Only respondents who answered “yes” to Q10.)

Use Going-to-the-Sun Road with a one-hour travel delay? (Q11) (Answered “yes” to Q10)		
Response	% Responses	% Responses
Yes	56%	64%
No	31%	36%
Don't Know	13%	---
Total	100%	100%

When the travel delay was doubled from 30 minutes to one-hour, respondents who would accept the delay and still use Going-to-the-Sun Road dropped by 23 percent.

Fifty-six percent of the respondents would accept a one-hour travel delay, 31 percent would not, and thirteen percent don't

know. A larger percentage (13%) of respondents was uncertain as to how they would react to a one-hour travel delay, compared to a 30-minute travel delay (6%).

Among those with a “yes” or “no” response, 64 percent would accept the delay and use the Road and 37 percent would not. This 64 / 36 split is the standard against which the analysis has been developed.

- **Heard of Going-to-the-Sun Road.** Consistent with responses to Q10, those who have heard of Going-to-the-Sun Road are more slightly accepting (69%) of a potential one-hour travel delay than the average (64%). Respondents who have never heard of the Road are less accepting (54%) of the travel delay than the average (64%).

- **Prior Visits to Glacier National Park.** There was no appreciable difference between respondents who have been to the park and those who have never been. Sixty-five percent of respondents with a prior visit would accept the travel delay; 64 percent of those who have never visited the park would accept the one-hour travel delay.
- **Demographics.** Travel parties with children were less accepting (60%) of a one-hour travel delay than travel parties of non-senior adults only or seniors only (74%). Small (1 or 2 people) travel parties were more accepting (67%) of a one-hour delay than large (4+ people) travel parties (59%). Senior respondents were more accepting (77%) of a one-hour delay than non-senior respondents (60%). Male respondents (74%) were more willing to accept a one-hour delay than female respondents (57%). Similar to Q10, there was no correlation between respondent household income and responses to Q11.

Q12. If you knew that the travel delay might be up to four hours, would you still use the Road and accept the delay? (Only respondents who answered “yes” to Q10 and “yes” to Q11.)

Respondent receptivity to travel delays drops significantly, when the delay is four hours. Only twelve percent of the respondents would accept a four-hour travel delay; 71 percent would not, and seventeen percent don’t know. Again, the proportion of respondents who are uncertain as to how they would react to a four-hour travel delay increased as the amount of delay increased.

Use Going-to-the-Sun Road with a 4-hour travel delay? (Q12) (Answered “yes” to Q10 and Q11)		
Response	% Responses	% Responses
Yes	12%	15%
No	71%	85%
Don't Know	17%	---
Total	100%	100%

Among those with a “yes” or “no” response, only fifteen percent would accept the delay and use the Road; 85 percent would not.

- **Heard of Going-to-the-Sun Road.** A slightly higher proportion of those who have heard of Going-to-the-Sun Road would accept a four-hour travel delay

(16%) than those who have never heard of the Road (10%) relative to the average (15%).

- **Prior Visits to Glacier National Park.** There was no appreciable difference between respondents who have been to the park and those who have never been. Fourteen percent of respondents with a prior visit would accept the travel delay; fifteen percent of those who have never visited the park would accept the four-hour travel delay.
- **Demographics.** Senior respondents were more accepting of the four-hour travel delay (21%) than non-senior respondents (14%); only eleven percent of respondents who are 45 or younger were willing to accept the travel delay. No travel parties with children were willing to accept a four-hour travel delay; among travel parties without children, eighteen percent were willing to accept a four-hour delay. Responses to this question were similar across travel party sizes and respondent household income. Consistent with Q10 and Q11, female respondents were less willing to accept a four-hour delay (13%) than male respondents (16%). Once again, there was no correlation between respondent household income and responses to Q12.

Q13. If you knew that travel would be restricted to one-way traffic, would you still use the Road and accept the restriction? (Asked of all respondents.)

Use Road with one-way travel? (Q13)		
Response	% Responses	% Responses
Yes	71%	82%
No	15%	18%
Don't Know	14%	---
Total	100%	100%

Seventy-one percent of the respondents would still travel Going-to-the-Sun Road if it were restricted to one-way traffic, fifteen percent would not travel the Road, and fourteen percent don't know.

Among those with a "yes" or "no" response, eighty-two percent would accept the travel restriction and use the Road; eighteen percent would not. This 82/18 split is the standard against which the analysis is developed.

- **Heard of Going-to-the-Sun Road.** Respondents who have heard of Going-to-the-Sun Road were more accepting (87%) of a one-way travel restriction than the

average (82%). Respondents who have never heard of the Road were less accepting (75%) of the travel restriction than the average (82%).

- **Prior Visits to Glacier National Park.** Respondents who have been to the park before were more willing (86%) to accept a one-way travel restriction than respondents who have never been to the park (81%).
- **Demographics.** Senior respondents were more accepting of the one-way travel limitation (89%) than non-senior respondents (81%). Travel parties with children were less accepting of the travel limitation (78%) than travel parties without children (83%). Respondents with incomes below \$75,000 (88%) were more accepting of a one-way travel limitation than respondents with incomes above \$75,000 (71%). Consistent with prior questions, female respondents were less willing to accept a one-way travel limitation (79%) than male respondents (87%).

Q 14. Would you still come to Glacier National Park but visit other park attractions? (Asked of respondents who said “no” to Q13.)

This question was only asked of those who responded “no” to Q13. Since there were only 102 responses to Q14, the results should be used with caution, as there is a large potential margin of error associated with relatively low sample sizes.

Still come to Glacier National Park? (Q14)
(Respondents who said “no” to Q13)

Response	% Responses	% Responses
Yes	75%	95%
No	4%	5%
Don't Know	21%	---
Total	100%	100%

Seventy-five percent of the respondents would still come to Glacier National Park even if they did not use Going-to-the-Sun Road due to travel limitations; four percent said they would not come, and 21 percent don't know whether they would come or not.

Among those with a “yes” or “no” response, 95 percent would accept the travel restriction and use the Road; five percent would not. The sample size of respondents with a “yes” or “no” answer is 80 people.

The respondents who said they would not travel to Glacier have generally not visited the park before, but have heard of Going-to-the-Sun Road; would travel in a party size of two; are female, and are over 46.

Q15. If during the travel restrictions, you were provided with useful information from guides regarding possible wildlife viewing locations, photo opportunities, and other visitor opportunities, would you use the Road and accept the restrictions? (Asked of all respondents)

Use Road if useful information is provided? (Q15) (All Respondents)		
Response	% Responses	% Responses
Yes	85%	92%
No	7%	8%
Don't Know	8%	---
Total	100%	100%

This question was asked of all respondents. The intent was to observe whether providing information to make the travel delay more enjoyable or useful would improve the percentage of visitors who would use the Road with its travel limitations.

Eighty-five percent of the respondents would use Going-to-the-Sun Road with travel limitations if useful information were provided, seven percent would not use the Road, and eight percent don't know. Even though the respondent didn't know what information would be provided or how it would be provided, the proportion of "don't know" responses decreased from prior questions.

Among those with a "yes" or "no" response, 92 percent would use the Road and eight percent would not. This 92/8 split is the standard against which the analysis is developed.

Those who would not be persuaded to use the Road with this information have no demographic characteristics that distinguish them from the average respondent. Ninety-six percent of those who said they would not use the Road if there were a four-hour delay reversed their position to say they would use the Road if useful information were provided.

This reversal suggests that how information is presented (and how questions are asked) has a powerful impact on the potential visitor's behavior. Commitments to

compile and deliver information to improve the traveler's experience during the travel restrictions can significantly improve the proportion of visitors traveling to the park.

Travel Alternatives (Q16) (All Respondents)		
Responses	% Responses	% Responses
Pay a fee to drive own vehicle	33%	36%
Take a free tour bus	46%	52%
Not visit Road; visit other areas	7%	8%
Not visit Glacier National Park	4%	4%
Don't know	9%	---
Other response	1%	---
Total	100%	100%

Q16. If Road construction on Going-to-the-Sun Road limits traffic in the park, the National Park Service is considering some travel alternatives. Which of these choices would you prefer to ... pay a fee to drive your own vehicle on Going-to-the-Sun Road, take a free tour bus on Going-to-the-Sun Road, not visit Going-to-the-Sun Road

but visit other park attractions, not visit Glacier National Park, or don't know?
(Interviewers were instructed to record only one response per respondent.)

This question was asked of all respondents. The most popular travel alternative is taking a free tour bus; 46 percent of the respondents preferred this choice. One-third of the respondents would elect to pay a fee to drive their own vehicle over Going-to-the-Sun Road. Only seven percent would visit the park but avoid Going-to-the-Sun Road. Only four percent would elect not to visit the park when there are travel restrictions to Going-to-the-Sun Road. Nine percent could not provide a response and one percent offered other remarks.

- **Fee to Drive.** Those who would elect to pay a fee to drive their own vehicle tend to have heard of Going-to-the-Sun Road, have larger travel party sizes, be between 46 and 64 years old, and have higher household incomes. Gender and the presence of children were not factors.
- **Free Tour Bus.** Those who would prefer a free tour bus tend to have not heard of Going-to-the-Sun Road, have smaller (1 or 2) travel party sizes, have pre-school children, and lower household incomes.

- **Visit Elsewhere.** Those who would not use Going-to-the-Sun Road but would visit other park attractions tended to be newcomers to the park who have not heard of Going-to-the-Sun Road, and plan to travel in a party of seniors only. The respondents tended to be either under 25 or 65 and older.

The number of respondents who would not visit Glacier National Park is too low to characterize without a high potential margin of error.

Glacier National Park Activities and Accommodations

Q7. “I am going to read activities that some people enjoy while visiting Glacier National Park. Please tell me whether your travel group might participate in these with a “yes, likely”, “no, unlikely” or “not sure” response...”

More than 90 percent of the respondents expect to view sights, take photographs and take scenic drives. Two-thirds of the participants expect to take day hikes. Other expected activities in descending order are fishing, boating, horseback riding, bicycling and overnight hiking. This ranking of activities is generally consistent with prior visitor surveys.

- For those planning to participate in more passive activities such as viewing sights and taking scenic drives, between 88 and 90 percent would accept a 30-minute travel delay over Going-to-the-Sun Road.

Only fifteen to eighteen percent would accept a four-hour travel delay.

- For those participating in more active activities, such as overnight hiking and bicycling, acceptance of a 30-minute travel delay was slightly lower (75% to 87%) and acceptance of a four-hour travel delay was higher (20% to 27%) than the average.

Participation in Activities (Q7) (Descending Order)

<u>Response</u>	<u>% Respondents</u>
Scenic Driving	96%
Viewing Sights	95%
Photographing	95%
Day Hiking	66%
Fishing	45%
Boating	36%
Horseback Riding	35%
Bicycling	27%
Overnight Hiking	10%

Q8. While visiting the Glacier National Park area, would it be likely that you will camp out in a tent, sleep in your camper or motor home, use a motel, lodge or bed-and-breakfast or condominium outside of Park, use a motel, lodge, bed-and-breakfast or condominium inside the Park or stay with family re friends inside their residence? (Multiple “yes” responses were recorded.)

Overnight Accommodation (Q8) (multiple responses recorded)	
<u>Response</u>	<u>% of Respondents</u>
Motel+ / Outside Park	63%
Motel+ / Inside Park	60%
Camper / Motor Home	27%
Tent	18%
Family & Friends	10%

Sixty percent or more of the respondents planned to stay in a motel, lodge, bed-and-breakfast or condominium while visiting the area; about one-fourth (27%) plan to sleep in their camper or motor home. Eighteen percent plan to camp out in a tent; about one-half (55%) of the tent campers plan to combine this with an overnight hike. Only ten percent plan to stay with family or friends in their residence; none of these respondents are

from Montana.

There is very little correlation between the respondent’s overnight accommodation and the response to travel delays. There was slightly more tolerance for four-hour travel delays among those planning to camp out in a tent (21%) or sleep in their camper or motor home (17%) than average.

Q9. While staying in the park, would you prefer a historic lodge or cabin with minimal conveniences, a historic lodge or cabin with modern conveniences, or a modern motel or lodge with modern conveniences?

Inside Park Accommodations (Q9)	
<u>Reponses</u>	<u>% Responding</u>
Historic w/ modern conveniences	46%
Modern w/ modern conveniences	27%
Historic w/ minimal conveniences	16%
Other Response	11%
Total	100%

This question was asked all respondents except for the 30 percent who said they would not likely stay in a lodging accommodation inside the park in response to Q8. Among these respondents, 46 percent would prefer a historic lodge or cabin with modern conveniences, 27 percent would prefer a

modern motel or lodge with modern conveniences, sixteen percent prefer a historic lodge or cabin with minimal conveniences, and eleven percent provided some other response. There was a clear preference for a historic lodge or cabin (46% + 16% = 62%) and a clear preference for modern conveniences (46% + 27% = 73%).

Responses to inquiries about travel delays were similar regardless of preferred lodging accommodations inside the park.

Why did you choose not to travel to Glacier National Park? (Q3)

(Multiple Responses Allowed)

Response	% Responses
Went somewhere else	20%
Did not take vacation	12%
Too far from home	12%
Financial reason (not gasoline)	6%
Forest Fires	4%
Personal or Family	3%
Gas Prices too high	1%
Other (Miscellaneous Reason)	47%

(Refusals and "don't know" responses excluded)

Q3. Why did you choose not to travel to Glacier National Park?

Interviewers were instructed to listen to the respondent's reason and check one of several provided responses and mark "other" reasons, as appropriate. Twenty percent of the responses were because the respondent went somewhere else; twelve percent reported that they did not take a vacation and twelve percent said it was too far from home; six percent reported financial reasons and four percent said they did not come because of forest fires. Interviewers report that the type of "other" reasons provided included remarks like "just did not want to go."

Respondent Demographics

Residence. The list provided by Travel Montana contained only individuals from the United States; no attempt was made to exclude individuals from other countries.

Among the (US) respondents, the list of top ten states of residency is provided in the table. Only three Montanans participated in the survey.

With the exception of Montana, this list is generally comparable to the list of states where Glacier National Park visitors reside.

Respondents Resident State In Descending Frequency) (Q19)
Washington
California
Minnesota
Wisconsin
Ohio
Pennsylvania
Texas
Illinois
Indiana

Travel Party Size. The average travel party size was 3.6 people. Smaller travel party sizes were more tolerant of Going-to-the-Sun Road travel limitations than larger party sizes.

This average is lower than the average travel party size of respondents to the *2000 Survey of Visitors* (2.8 people).

The *1994 Visitor Survey* reported an average travel party size of 2.7 people for summer visitors. The *1991 Visitor Survey* reported an average travel party size of 3.7 people.

Average Travel Party Size (Q17)	
This Survey	3.6
2000 Survey of Visitors	2.8
1994 Visitor Survey	2.7
1991 Visitor Survey	3.7

Travel Party Relationship (Q18)

<u>Response</u>	<u>% Responses</u>
Family	76%
Family & Friends/Relative	21%
Alone	1%
Organized Group	1%
Other	<u>1%</u>
Total	100%

Travel Party Relationship. Seventy-six percent of the respondents expect to travel with their family; 21 percent expect to travel with family and friends or a relative; one percent plan to travel alone; one percent plan to travel with an organized group.

In the *2000 Survey of Visitors*, 62 percent were traveling with family only, 25 percent were traveling with family or friends and

eight percent were traveling alone. In the survey of visitors, a number of people traveling alone were traveling on business not on vacation.

Travel Party Demographics. The most typical travel party contains a family comprised of two adults and one to two children.

- **Children.** Ten percent of all travel parties are expected to contain at least one young child under six years old and 24 percent are expected to contain at least one child between the ages of six and sixteen.
- **Adults 25 to 64.** Eighty-three percent of all travel parties are expected to contain at least one percent between 25 and 64. Thirty-seven percent of all travel parties are expected to contain only adults between 25 and 64.
- **Seniors.** Thirty-two percent of all travel parties are expected to contain at least one senior who is 65 or older. Fifteen percent of all travel parties are expected to contain seniors only.

Travel Parties Containing at Least One Person Who is: (Q21)

<u>Age</u>	<u>% of Total</u>
Less than 6	10%
6 to 16	24%
17 to 24	18%
25 to 64	83%
65 +	32%

Relative to the *2000 Survey of Visitors*, this survey has a higher representation of seniors and children.

Respondent Age (Q20)	
Age Category	% of Total
< 25	2%
25 to 45	28%
46 to 64	48%
65 +	<u>22%</u>
Total	100%

Respondent Age. The respondents' average age was 51. Respondents under 25 comprised two percent; respondents between 25 and 45 comprised 28 percent of the total; respondents 46 to 64 comprised 48 percent of the total; and respondents 65 or older comprised 22 percent of the total.

In the *2000 Survey of Visitors*, the average age of the respondents was 50. In the *1996 Visitor Survey*, the average respondent age was 43 years. In the *1994 Visitor Survey* the average age was 47 years for summer visitors. In the *1991 Visitor Survey*, the average respondent age was 44 years.

2000 Household Income (Q22)	
Category	% Responses
< \$25,000	8%
\$25,000 to \$75,000	57%
\$75,001 to \$100,000	22%
\$100,001 to \$150,000	9%
> \$150,000	<u>4%</u>
Total	100%
(Refused and "don't know" responses excluded)	

2000 Household Income. Respondents were asked to place their household income within a category read by the interviewer. Excluding the 30 percent refusals and "don't know" responses, 65 percent of the respondents earned \$75,000 or less and 35 percent earned more than \$75,000. Thirteen percent earned \$100,000 or more. This breakdown is generally comparable with statistics from the U.S. Bureau of the Census (*Money Income in the United States: 1999*) where twelve percent of all house-

holds earned an income of more than \$100,000 and eighteen percent earned between \$75,000 and \$100,000.

Respondents to the *2000 Survey of Visitors* earned slightly more income. In this survey, 56 percent earned \$75,000 or less and 44 percent earned more than \$75,000 including 26 percent who earned \$100,000 or more.

Analysis of Nonresponse

The most frequent states of residency for survey respondents is compared with the most frequent states of residency for those who refused to participate in the survey in the table to the right.

Based on this information, respondents from Washington, California and Minnesota were less likely to refuse an interview than average. Respondents from Michigan, Georgia and Alabama were more likely to refuse an interview than average.

**Top States of Residency:
Respondents and Refusals**

Respondents	Refusals
Washington	Michigan
California	Georgia
Minnesota	Alabama
Wisconsin	California
Ohio	Florida
Pennsylvania	Louisiana
Texas	Wisconsin
Illinois	Minnesota

Comparison with 2000 Survey of Visitors

This survey of potential visitors is the second of two visitor surveys to be conducted as part of this study. The first survey was conducted in August 2000 among 1,432 visitors to Glacier National Park. The *2000 Survey of Visitors* was a handout-mail back survey that was distributed at the entrance gates to the park by National Park Service Staff. Responses to the surveys can be compared in two general areas -- reactions to travel restrictions to Going-to-the-Sun Road and demographics.

Generally, the potential visitors (this survey) were more favorably inclined to visit the park with travel restrictions to Going-to-the-Sun Road than were the on-site visitors (*2000 Survey of Visitors*). This is evident by comparing responses to several similar questions in the two surveys.

The *2000 Survey of Visitors* asked the question, "If you had known about the road restrictions on Going-to-the-Sun Road, would you still have come?" Using the yes/no responses only and assuming that the "don't know" and "uncertain" responses are proportionally divided among the yes/no, then 75 percent said they would still have come to the park and 25 percent said they would not have come.

Among those who had said they would not use Going-to-the-Sun Road with travel restrictions, the 2001 Survey of Potential Visitors asked the question, “Would you still come to Glacier National Park but visit other park attractions?” (Q14) Using the yes/no responses only, 95 percent said that they would come to the park and only five percent said they would not.

Later in the potential visitor survey, respondents were given a set of travel alternatives if road construction limits travel (Q16); 96 percent of the respondents selected one of the travel alternatives and four percent said they would not come to the park.

Table 1: Questions Relating to Going-to-the-Sun Road Travel Restrictions

2000 Survey of Visitors		2001 Survey of Potential Visitors	
If you had known about the road restrictions ... would you still have come ...? (Q26)		“Would you still come to Glacier ... but visit other park attractions? (Q14) (<i>Those answering “no” to using the Road with travel restrictions.</i>)	
		“If road construction...limits traffic ... the NPS is considering some travel alternatives ... which would you prefer? (Q16)	
Response	% of Total	Response	% of Total
Yes	75%	Yes	95%
No	25%	No	5%
Don't know	---	Don't know	---
Total	100%	Total	100%

Both surveys asked respondents to indicate a preference for travel alternatives, if there were road delays or restrictions on Going-to-the-Sun Road. The ranking of travel alternative preferences was similar, as summarized below. In both cases, the respondent's first choice was to take a tour bus, followed by using their private vehicle in some restricted way.

Table 2: Questions Relating to Travel Alternatives

2000 Survey of Visitors		2001 Survey of Potential Visitors	
“If you knew in advance that there would be a one-hour road construction delay...and a sight-seeing bus were available every 15 minutes...would you...? (Q27)		“If road construction...limits traffic in the park, the National Park Service is considering some travel alternatives. Which of these would you prefer...? (Q16)	
Response	% of Total	Response	% of Total
Take a sight-seeing bus	45%	Take a free tour bus	52%
Wait and drive own vehicle	36%	Pay a fee to drive own vehicle	36%
Come but not visit Logan Pass	11%	Not visit Going-to-the-Sun Road, but visit other places	8%
Not visit the park	8%	Not visit the park	4%
Don't know/uncertain	---	Dont know/uncertain	---
Total	100%	Total	100%

The following table compares respondent and travel party demographic characteristics.

Table 3: Respondent and Travel Party Demographics

Characteristic	2000 Survey of Visitors	2001 Survey of Potential Visitors
Average Travel Party Size	2.8	3.6
Respondent Gender: % Female	55%	60%
Respondent Gender: % Male	45%	40%
Respondent Average Age	50	51
Respondent Income: < \$25,000	11%	8%
Respondent Income: > \$100,000	26%	13%
Residence: US	90%	100%
Residence: Outside US	10%	0%
US Residence: Montana	20%	1%
US Residence: All But Montana	80%	99%